Managing Clients

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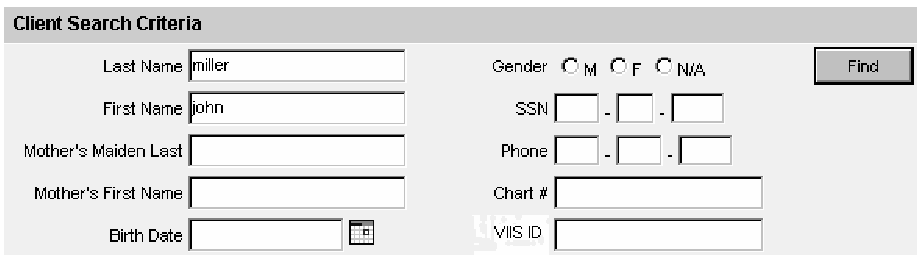
Because VIIS receives birth record downloads, you should attempt to find a client in VIIS before entering him or her as a new client. However, VIIS will attempt to deduplicate (compare entered information against information saved to the registry for duplicate clients) client records prior to saving the information on the Enter New Client screen.

Finding Clients

When searching for an existing client in VIIS, more information is not always better. By entering too much information about a client (mother's maiden name, social security number, phone number, birth date, etc.) you will increase your entry time and decrease the odds of finding the client due to typing and interpretation errors. We recommend that you supply four characters of the client's last name and three characters of the first name only, unless the client's name is very common, in which case supplying a complete name, birth date, or mother's maiden name will help narrow the search.

1. Click on Manage Client under the Clients section of the menu panel.



2. In the Client Search Criteria box, you have several options for finding your client.

- Last Name: Entering the first three letters of the client's last name, along with the first two letters of the first name, will initiate a search of all clients matching those letters. Entering fewer than three letters in the last name field will result in an exact name search; for example, entering the letters "Li" will produce only last names of "Li." If the client's name is common, typing in the full name will narrow the search.
- First Name: Entering the first two letters of the client's first name, along with the first three letters of the last name, will initiate a search of all clients matching those letters. If the client's name is common, typing in the full name will narrow the search.
- Mother's Maiden Last: Entering the mother's maiden last name, in combination with the data entered in the above two fields, will narrow a search for a client with a common name. Alternately,

Manage Client vs. Manage Immunizations
Manage Client and Manage Immunizations are the same query; in other words, they both utilize the client search function. The difference is that the Manage Client query will display the Manage Client screen, which consists of the client's demographic information, responsible person(s), etc., while the Manage Immunizations query will display the client's Immunization History screen.

Entering Names
On all first and last names entered into VIIS for client searches, VIIS disregards spaces, apostrophes, and hyphens entered. This is because names in the VIIS database do not include these characters.

you may find all clients associated with a mother by entering only the mother's first name and maiden last name.

- Mother's Maiden First: Entering the mother's first name, in combination with the data entered in the above three fields, will narrow a search for a client with a common last name. Alternately, you may find all clients associated with a mother by entering only the mother's maiden first and last names.
- Birth Date: Entering the client's birth date in conjunction with his or her first and last name will narrow a search for a common name. Otherwise, it is not necessary to enter a date in this field.
- Gender: Indicating the gender of the client will narrow a search for a common name, especially if the first name is androgynous.
- SSN: Entering the Social Security number (SSN) only will produce a single name match. Note: To find a client using his or her social security number, the number must have been entered previously for the client.
- Phone: Entering the client's phone number only will produce a single name match. However, this method is not recommended, as a phone number may not be entered for a client and phone numbers may change over time.
- Chart #: Entering the client's chart number only will produce a single name match. Note: To find a client using this method, the chart number must have been entered previously for the client.

- Registry: Changing the designation in this field allows you to query another state's immunization registry. Refer to the Querying Other Registries chapter of this manual for more information.

3. Press Find.
4. If multiple records are found matching the information you entered, a table listing up to 75 matches with detailed information on each will be shown below the Find Client Information box. To choose a client from this list, click on the client's last name, underlined and in blue.

Last Name	First Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
MILLER	JOHN	02/20/1993		JOY	DEPAS	M	
MILLER	JOHN	10/01/2001		BETSY	MILLER	U	555-5555

5. If only one client matches your search, the Manage Client screen for that individual will display automatically.

Social Security Numbers

If you attempt to enter a new client or edit an existing client using a SSN that is already stored in VIIS for a different client, the system will display a warning message letting you know that the system has not saved the SSN for the client, but that all other information has been saved.

6. If no clients match your search, recheck the information you entered for accuracy. If you suspect the client has not been entered into VIIS, proceed to “Entering New Clients.”

Use of Pick Lists in VIIS

When entering information on new clients or editing client information, you will use pick lists for many fields. VIIS uses pick lists — fields that contain a list of options from which you may choose — rather than free text fields for certain input data. The advantages of pick lists over free text fields include:

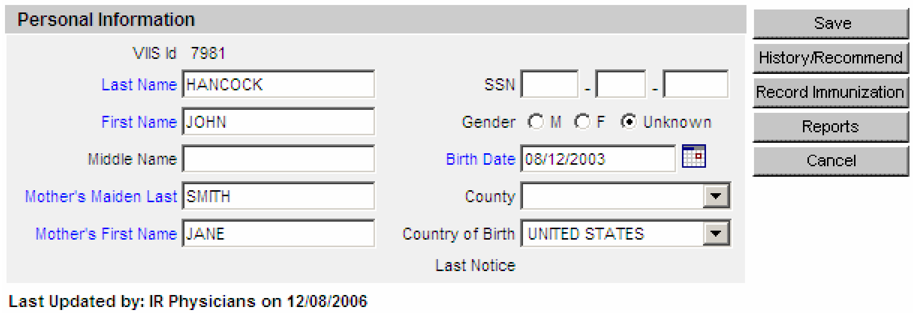
- Ease of use. Pick lists allow users to quickly fill in a data field without typing in the information.
- Health Level 7 (HL7) compliant. HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems to transfer data easily.
- Uniformity of entered data. By choosing information from a pick list, users do not risk entering conflicting information that could decrease the accuracy of VIIS reports. For example, one user using a free text field might enter a county name using an abbreviation, while another user might spell out the entire name.
- Confidentiality. By using standard pick lists, VIIS avoids confidentiality issues associated with the typing of free text that could be construed as medical record information.

Editing/Entering Client Information

The Manage Client screen allows you to update or change specific, non-immunization information relating to any client in VIIS. The Enter New Client screen, accessed by clicking this option on the menu panel, allows you to input this information for a client new to VIIS. The Manage Client and Enter New Client screens are divided into four parts: personal information header, client information tab, responsible person(s) tab, and client comment(s) tab.

Personal Information Header

The Personal Information section at the top of the Manage Client/Enter New Client screens contains client-specific information fields used primarily to distinguish among clients when doing client searches. All fields shown in a blue font are required. Refer to Appendix 2 of this manual for information on allowable entry characters and names for these fields.



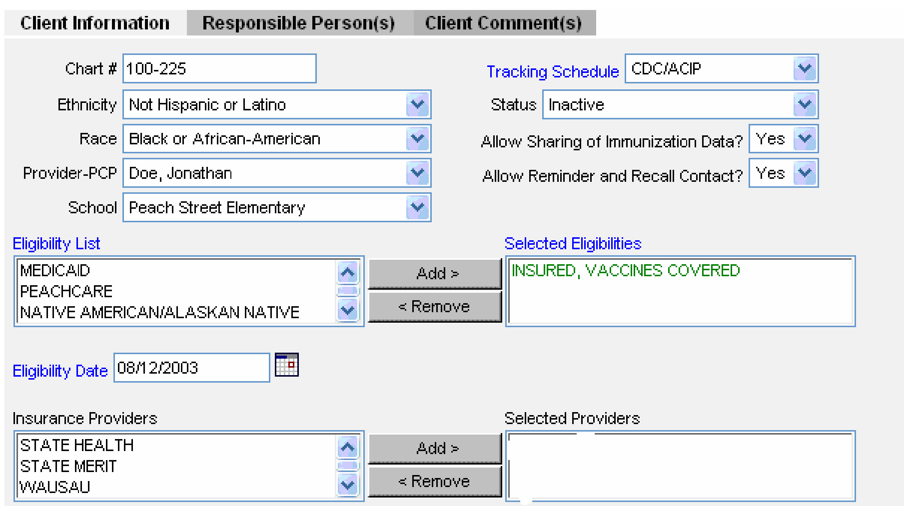
1. VIIS Id: This field shows the unique system ID for the patient.
2. Last Name: Required field.
3. First name: Required field.
4. Middle name: Optional field.
5. Mother's Maiden Last: Required field. VIIS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication.
6. Mother's First Name: Required field. VIIS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication.
7. SSN: The SSN field is optional. If the field is blank, a SSN may be entered. Once the SSN is entered and saved, however, a provider cannot change it. In addition, it will not show on the Manage Client screen (it will say "On File") and will not appear on any reports. *As the SSN cannot be easily changed once it is entered, enter this information very carefully.*
8. Gender: Click the appropriate radio button to choose male or female. This field is optional.
9. Birth Date: This is a required field. Fill in the field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press OK. Children entered by the Virginia Vital Records program do not have editable birth dates. The parent/guardian must contact the Virginia Vital Records program in the event an incorrect birth date is located. Contact the VIIS Help Desk to obtain the Vital Records phone number.
10. County: This optional field will be used by public organizations that are responsible for all clients within the county.
11. County of Birth: This field defaults to "United States." Use the pick list to select a different county of birth, if applicable
12. Last Notice: This field shows the last date that a recall/reminder notice was created for the client.

13. Updating organization: Below the Personal Information Header, the name of the organization that last updated the client's information displays in bold, along with the date the update was entered.

Client Information Tab

The Client Information tab gives additional information about the client, such as insurance carrier, primary care physician, chart number, etc. Only the Tracking Schedule and Funding Programs/Eligibilities (insurance/medical assistance information) and Eligibility Date fields under this tab are required.

1. Chart #: You may type in your organization's chart number for the client. A client may have numerous chart numbers associated with him or her; each number is organization dependent.
2. Ethnicity: Choose the client's ethnic background from the pick list provided.
3. Race: Choose the client's race from the pick list provided.
4. Provider (PCP): Fill in the client's primary care physician (PCP) or health care organization from the pick list, if provided. This information is used only for reporting.



5. School: Fill in the client's school from the pick list, if provided. This information is used only for reporting.
6. Tracking Schedule: This required field defaults to the Center for Disease Control and Prevention/ Advisory Committee on Immunization Practices (CDC/ACIP) schedule.
7. Status: Choose Active from the pick list if you want this client to be associated with your organization, meaning he or she is receiving services from you. When you specify a client as Inactive, you make him or her inactive for your organization only. This

Generation of reminder and recall notices

Reminder and recall notices are generated for every responsible person associated with a client, given that the following conditions are met:

- The client's status is not set to "Inactive" or "Permanently Inactive-Deceased on the Client Information tab.
- The "Allow Reminder and Recall Contact? Indicator on the Client Information tab is set to "Yes."
- The responsible person's "Notices?" indicator on the Responsible Person(s) tab is checked. The responsible person(s) checked for notices has sufficient name and address information listed in the Responsible Person(s) tab.

information affects recall and reminder notices and Clinic Assessment Software Application (CASA) and Health Plan Employer Data and Information Set (HEDIS) reporting. Choosing Permanently Inactive — Deceased will inactivate the client for all organizations using VIIS. Choose this option only if you know the client to be deceased.

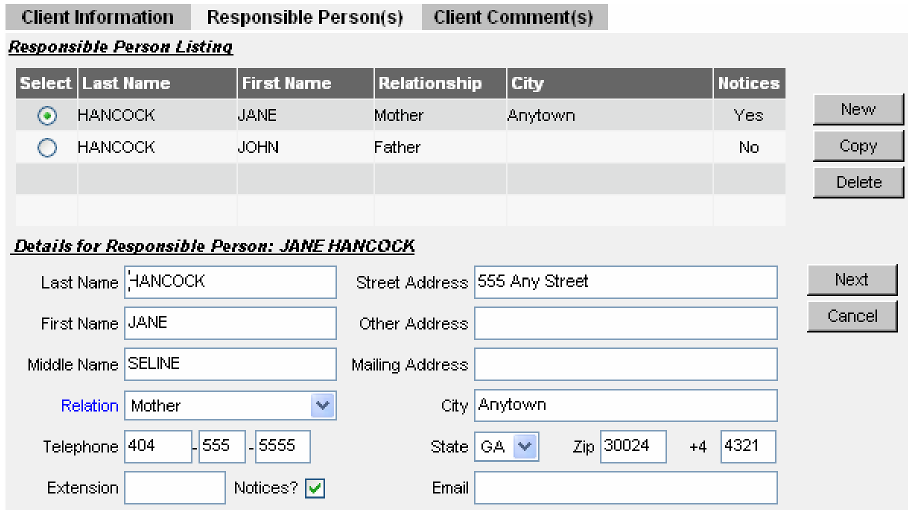
8. Allow Sharing of Immunization Data?: Parents or responsible persons may choose not to share their immunization information. If you choose No from the pick list, the record will be accessible only by your organization. Other organizations trying to access the record will receive a message referring them to you for further client information.
9. Allow Reminder and Recall Contact?: By choosing Yes from the pick list, you are allowing reminder/recall notices to be sent to this client's responsible person(s). If the parent chooses not to have reminder/recall notices sent, choose No from the pick list.
10. Funding Programs/Eligibilities: This is a required field that gives information on the client's eligibility to receive publicly funded vaccines. To select an eligibility type/funding program, highlight the appropriate funding source in the box at the left by clicking on it. Then press Add. Multiple funding programs/eligibilities may be selected.
11. Insurance Providers: To select an insurance provider from the list at left, highlight the provider by clicking on it. Then press Add. Multiple insurance providers may be selected. This information is used for HEDIS reporting

Once a status of Permanently Inactive – Deceased has been entered in the Status field, the field can non longer be edited by the organization. To change a status of Permanently Inactive – Deceased, contact the VIIS Help Desk..

Responsible Person(s) Tab

The Responsible Person(s) tab allows you to identify client contact information and the persons to whom you may send reminder/recall notices. The only required field under this tab is the Relation field. However, if you want notices sent to a responsible person, you will need to fill in the person's first and last name and full address, and check the Notices box.

1. Click on the Responsible Person(s) tab.



2. To edit an existing responsible person, do the following:
   - Click on the Select radio button next to the name of the person you wish to edit.
   - Change or add information for the fields listed.
   - Press Next.
3. To enter a new responsible person, fill in the following information:
   - Last Name: Enter the last name of the responsible person into this field.
   - First Name: Enter the first name of the responsible person into this field.
   - Middle Name: Enter the responsible person's middle name in this field.
   - Relation: Choose the relationship of the responsible person to the client from the pick list provided. This is a required field.
   - Telephone: Enter the responsible person's telephone number, including the area code, in this field.
   - Extension: Enter the responsible person's extension to the above telephone number, if any, into this field.
   - Street Address: Enter the responsible person's street address into this field.
   - Other Address: Enter the responsible person's additional address information, if any, into this field. For example, a suite number or apartment number could be entered here.
   - P.O. Box: Enter the responsible person's post office box, or mailing address, if different that the street address, into this field. If there is an address entered in this field, it will be

displayed as the client's address on the remaining client information tabs and client reports.

- City: Enter the responsible person's city into this field.
- State: Choose the responsible person's state from the pick list provided.
- ZIP: Enter the responsible person's ZIP code in this field.
- +4: Enter the responsible person's +4 code in this field, if it is known.
- Notices?: Check this box if you wish reminder/recall notices to be sent to this responsible person.
- Primary?: Check this box if you wish the displayed address appear on client reports and on client screen headers.

4. To enter a new responsible person and save the information you entered in the Responsible Person Listing or view the next responsible person's record, press Next.
5. To clear existing information and enter a new responsible person, press New.
6. To cancel unsaved information you entered, press Cancel.

Copying an existing record

1. Select the radio button next to the record you wish to copy on the Responsible Person Listing table.
2. Press Copy.
3. This information may now be edited and saved as another responsible person record.

Deleting an existing record

1. Select the radio button next to the record you wish to delete on the Responsible Person Listing table.
2. Press Delete.
3. Press OK in the confirmation box.

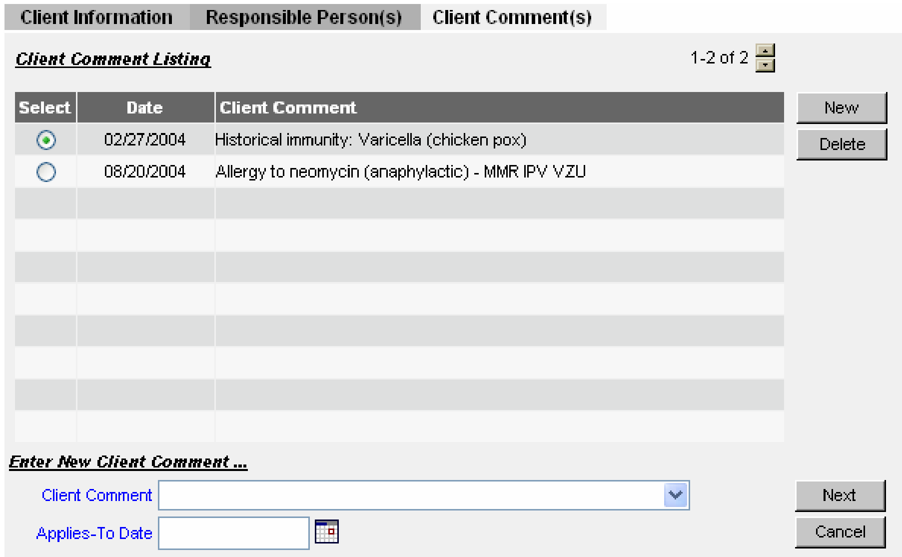
Client Comment(s) Tab

The Client Comment(s) tab allows you to enter comment and contraindication information for a client in pick list form.

1. Click on the Client Comment(s) tab.

Restart Comments
If a client has a comment indicating the restart of a vaccine group and an Applies To Date is specified, all vaccinations prior to that date are not evaluated as part of the serve. Any doses recorded on or after the Apples To Date will be evaluated as if they were the first doses received for that vaccine group.

Immunity Comments
Immunity comments are linked to vaccine group recommendations. If a client has an immunity comment and an Applies To Date is specified. a recommendation for that vaccine group will not display on the client's record.



2. Enter the following information:

- Choose the appropriate comment/contraindication from the Client Comment pick list.
- Enter the date to which the comment refers in the Applies-To Date field. This field is required if a client comment has been selected. Fill in the field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. Then choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press OK.

3. To enter the comment into the Client Comments Listing and enter a new comment or view the next comment, press Next.
4. To clear existing information and enter a new comment, press New.
5. To cancel unsaved information you entered, press Cancel.
6. To read comments in a list with more than 10 comments, use the scrolling arrows at the top right corner of the box. A counter near the scrolling arrows displays the number of comments entered..

Deleting an existing comment

1. Select the radio button next to the comment you wish to delete on the Client Comment Listing table.
2. Press Delete.
3. Press OK in the confirmation box.

Saving Client Information

There are several ways to save information on the Manage Client/Enter New Client screens:

Save:	When pressed, the SAVE button at the top of the screen will save all information fields within the Personal Information Header, Client Information Tab, Responsible Person(s) tab, and Client Comment(s) Tab to the VIIS database. Once the client data is saved, the message “Client Up-dated” will appear at the top of the Personal Information Header.
History/Recommend:	As with the SAVE button, the HISTORY/RECOMMEND button will save all information fields. Once the information is saved, the clients Immunization History screen will display.
Record Immunization:	When the RECORD IMMUNIZATION button is pressed, all information fields will be saved and the Pre-Select immunization screen will display. This button allows you to by pass the history screen for a client and go directly to adding immunizations.
Reports:	As with the SAVE button, the Reports button will save all information filed. Once the information is saved, the Reports Available for Client screen will display, so that a report may be generated for the client. Refer to the Reports and Forms chapter of this manual for more information on reports.
Add Next:	When the ADD NEXT button is pressed, all information fields will be saved and a blank Edit/Enter New Client screen will be displayed.
Cancel:	When pressed, the CANCEL button clears all entered information and does not save it to VIIS. The Find Client or Enter New Client screen is displayed.

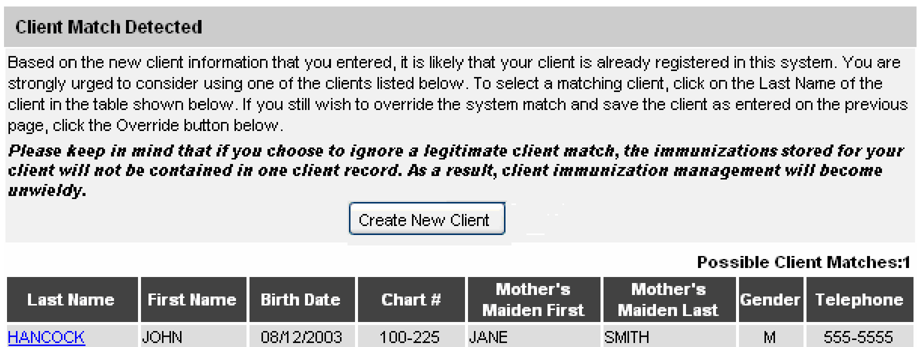
Social Security Numbers
If you attempt to enter a new client or edit an existing client using a SSN that is already stored in VIIS for a different client, the system will display a warning message letting you know that the system has not saved the SSN for the client, but that all other information has been saved.

Deduplicating Client Records

After you enter a new client and press one of the buttons that will save the data, VIIS initiates a process that ensures that the client information you entered does not duplicate a client that already exists in VIIS.

If after attempting to save a new client you receive a message box titled "Client Match Detected," VIIS has determined that the client you are attempting to save already exists in the database. You should select the client record by clicking the link provided

If after attempting to save a new client you receive a message box titled "Client Match Detected,: you should read the message and proceed carefully. A table below the message box contains one or more names of potential matches within VIIS. Click on each last name to display his or her information. VIIS will identify matching clients even if the client has had a name change; therefore, if you do receive a list of potential matches, click on the link(s) to determine whether one of the links matches your client's record.


Client Match Detected

Based on the new client information that you entered, it is likely that your client is already registered in this system. You are strongly urged to consider using one of the clients listed below. To select a matching client, click on the Last Name of the client in the table shown below. If you still wish to override the system match and save the client as entered on the previous page, click the Override button below.

Please keep in mind that if you choose to ignore a legitimate client match, the immunizations stored for your client will not be contained in one client record. As a result, client immunization management will become unwieldy.

Create New Client

Possible Client Matches:1

Last Name	First Name	Birth Date	Chart #	Mother's Maiden First	Mother's Maiden Last	Gender	Telephone
HANCOCK	JOHN	08/12/2003	100-225	JANE	SMITH	M	555-5555

If after reviewing all the names given in the table you do not find a match for your client, press the Create New Client button. A confirmation box will appear; press OK. Be aware that if you do override the listed matches and end up creating a duplicate record for a client, it will be difficult to manage the client's immunization and personal information and the registry will lose its accuracy and efficiency.